



Iowa  
Vocational  
Rehabilitation  
Services

*Finding solutions. Generating success.*

# **Iowa Vocational Rehabilitation Services**

## **2007-2010 Strategic Plan**

# Iowa Vocational Rehabilitation Services 2007 - 2010 Strategic Plan

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# Iowa Vocational Rehabilitation Services 2007 - 2010 Strategic Plan

## Guiding Statements

### Our Mission

We provide expert, individualized services to lowans with disabilities to achieve their independence through successful employment and economic support.

### Our Motto

Finding Solutions. Generating Success.

### Our Vision

To be a respected leader that delivers innovative services to better the lives of lowans with disabilities.

### Our Guiding Principles

We are responsive to the unique needs and goals identified by individuals with disabilities.

We demonstrate teamwork and cooperation among staff, customers and partners.

We operate with trust and integrity.

We demonstrate compassion and respect for all people.

We value continued improvement and learning.

We openly communicate with clarity and consideration.

We are results driven.

# Iowa Vocational Rehabilitation Services 2007 - 2010 Strategic Plan

## Top Strategic Objectives (in priority order)

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1. Develop and foster an engaging work environment that promotes innovation and continual improvement to achieve organizational priorities.
2. Develop a workforce that identifies and responds to changing workforce and work place needs.
3. Develop and deliver customer service that addresses customer needs and requirements.
4. Increase efficiency and customer value through performance accountability and continuous quality improvement.
5. Build external relationships that contribute to improved services that better the lives of Iowans with disabilities.

# Iowa Vocational Rehabilitation Services 2007 - 2010 Strategic Plan

## Roll-Out Strategic Plan

Actions	Person(s) Responsible	Due By
Send 1 <sup>st</sup> draft to Steve/Cindy for review	Jane McCord	9/28/07
Share 1 <sup>st</sup> draft with strategic planning team leads for feedback and input and make changes to plan. Send changes to Cindy Axne.	Steve/Team leads	10/9/07
Identify and inform staff of assignments	Team leads	10/12/07
2 <sup>nd</sup> draft to Steve for review and dissemination to team leads	Cindy Axne	10/16/07
Objective teams meet to finalize their action plan with: steps, timelines, person(s) responsible and resources. Send action plan to Cindy	Team Leaders	10/26/07
Final strategic plan with action plans sent to Steve for final approval	Cindy Axne	11/2/07

# Iowa Vocational Rehabilitation Services 2007 - 2010 Strategic Plan

## Objective 1 –

**Develop and foster an engaging work environment that promotes innovation and continual improvement to achieve organizational priorities**

Lead: Keith Hyland

Team: Carol Stewart, Linda Harris, Margie Woodward, Lisa Harms, Sally Prange

Outcomes	Actions	Person(s) Responsible	Due By
1. Workforce uses guiding principles and competencies needed to achieve organizational goals	1.1. Identify and promote resources and learning opportunities	Objective 1 Team	7/1/08
	1.2 Research and share best practices	Objective 1 Team	9/1/08
	1.3 Conduct organizational structure assessment. Determine changes needed to achieve organizational goals. Implement changes.	Charlie Levine, David Mitchell, Brian Maloney, Objective 1 Team	12/31/08
	1.4 Prepare bureau-specific individual development plans. Determine what general knowledge is needed by everyone -- regardless of bureau. Implement bureau development plans and individual knowledge needs into individual development plans.	Keith Hyland, Kenda Jochimsen, Tom Floren, David Mitchell, Charlie Levine, Brian Maloney, Bev Schmeling, Mike Maher, Ann Davis, all supervisors	1/31/09
2. Communication plan specific to an engaging work environment	2.1 Develop and implement a plan	Steve Wooderson	4/30/08
	2.2 Follow up and measure plan results	Steve Wooderson	10/31/08

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3. Create a climate that encourages new ideas and improvement and regularly recognizes employees	3.1 Incorporate Guiding Principles into IPPEs of all staff. Expect supervisors to promote guiding principles in their respective units.	Bev Schmeling	12/31/08
	3.2 Develop guidelines to promote consistency in recognition practices – across all units. Implement guidelines. Follow up and monitor implementation.	Bev Schmeling and Objective 1 Team	4/1/09 and ongoing
	3.3 Research, develop and implement best practices for encouraging ideas from staff. Recognize ideas and implement accordingly.	Bev Schmeling and Objective 1 Team	4/1/09
	3.4 Research and implement recognition systems that recognize innovation	Bev Schmeling and Objective 1 Team	4/1/09
	3.5 Develop and implement work unit practices to recognize staff regularly	Bev Schmeling and Objective 1 Team	7/1/09 and ongoing
4. Administrator/Bureau Chiefs model the desired behaviors of an engaging work environment and create a supportive work environment	4.1 Clarify and communicate expectations regarding desired behaviors	Steve Wooderson, Keith Hyland, Kenda Jochimsen, Tom Floren	2/29/08
	4.2 Ensure consistency in application of work procedures and practices	Charlie Levine, David Mitchell, Brian Maloney	7/1/08 and ongoing
	4.3 Monitor application of procedures and practices. Make changes as necessary.	Charlie Levine, David Mitchell, Brian Maloney	10/1/08 and ongoing

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5. Implement/manage information management systems that provide more timely information to employees so they can better monitor and improve performance	5.1 Use regular feedback mechanism on specific work issues	Keith Hyland, Kenda Jochimsen, Tom Floren, Brian Maloney, Charlie Levine, David Mitchell	10/31/08 and ongoing
	5.2 Use data to implement improved processes		
	5.3 Develop and implement monitoring schedule to assess data and develop appropriate process improvement initiatives	Keith Hyland, Kenda Jochimsen, Tom Floren, Brian Maloney, Charlie Levine, David Mitchell	10/31/08 and ongoing
6. Ensure employees work in a safe/secure environment	6.1 Plan for dealing with irate claimants or clients	Tom Kern, Sharon Worthington, RSB Field Supervisors, Bev Schmeling, Deb Castillo	3/31/08
	6.2 Identify and ensure understanding of, how to respond to emergencies	All Supervisors	7/1/08
	6.3 Connect with state initiatives	Deb Castillo, Tom Kern, Sharon Worthington	7/1/08



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## Objective 2 – Develop a workforce that identifies and responds to changing workforce and work place needs

Lead: Barb McClannahan

Team: Jeff Haight, Kenda Jochimsen, Jan Davis, Jolene Crafton

Outcomes	Actions	Person(s) Responsible	Due By
1. IVRS workforce plan accurately projects capacity issues	1.1 Identify the role and purpose of each bureau to accomplish objective #2	Steve Wooderson, Kenda Jochimsen, Keith Hyland, Tom Floren	7/31/08
	1.2 Identify staffing levels per optimum caseload	Keith Hyland, Tom Floren, Kenda Jochimsen	7/31/08
	1.3 Identify and communicate the required skills and abilities of staff that are needed to serve the caseload across the agency	Keith Hyland, Tom Floren, Kenda Jochimsen	7/31/08
	1.4 Apply the projections and capacity needs each time a staff person leaves employment	Keith Hyland, Tom Floren, Kenda Jochimsen	7/31/08 and ongoing
	1.5 Disseminate required skill sets to work in IVRS to colleges and universities	Keith Hyland, Bev Schmeling and Communications Specialist	9/1/08 and ongoing
	1.6 Develop outcomes measures that demonstrate successful recruitment and retention of qualified candidates to serve the mission and vision of the agency	Keith Hyland, Tom Floren, Kenda Jochimsen	9/1/08

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2. IVRS has clearly identified business and industry workforce needs in Iowa	2.1 Create strategies to develop business relationships and align local office action plans to the IVRS and RSA strategic plans	Charlie Levine, David Mitchell, Barb McClannahan	7/31/08
	2.2 Utilize the IVRS Business Database	IBN Data Team	7/31/08
	2.3 Develop a network to collect labor market information (LMI) that identifies current and future workforce trends.	Jolene Crafton, Barb McClannahan, Mike Maher, Jan Davis, and Communications Specialist	7/1/10
3. Increased capacity to respond to the developing customer needs of business and industry (B/I)	3.1 Monitor Employer Satisfaction Survey results	IBN Collaboration Team	1/31/08 and ongoing
	3.2 Track the demand from Business and Industry (B/I) for value-added IVRS services	Barb McClannahan and IBN Data Team	7/31/08 and ongoing
	3.3 Develop customized training agreements with B/I	Jan Davis, Club 26 and Area Office Direct Service Staff	7/31/08 and ongoing
	3.4 Develop staff training as needed to serve the customer	Mike Maher	10/1/08 and ongoing
	3.5 Communicate B/I needs to post secondary education and college counselors to ensure relevant college curriculum to meet the future needs	Mike Maher, Barb McClannahan and Communication Specialist	10/1/09 and ongoing

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4. IVRS clients prepared for the changing workforce demand	4.1 Provide assistance in small business development to create new employment situations leading to self-sufficiency	Lee Ann Russo+ Business Staff	1/31/08 and ongoing
	4.2 Work with secondary education to better prepare students in transition	Ruth Allison	1/31/08 and ongoing
	4.3 Identify and support post-secondary education and training programs that respond to the current emerging workforce needs within the state and its geographic regions	Steve Wooderson, Kenda Jochimsen, David Mitchell, Charlie Levine	7/31/08 and ongoing
	4.4 Provide incentives to B/I for job candidates in need of upgrading skills on existing jobs where wages and benefits are commensurate with the industry standard	Jan Davis, Jeff Haight	7/31/08 and ongoing
	4.5 Invest in client training that will result in high skill jobs that lead to self-sufficiency	Kenda Jochimsen, Jeff Haight Jim Crouch	10/1/08 and ongoing
	4.6 Identify resources to develop assessment tools that incorporates business profiles and job analysis data (coordinate with the release of IRSS phase II)	Kenda Jochimsen, Barb McClannahan	10/1/08

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	4.7 Increase the participation and completion of Iowa students in post-secondary programs	Charlie Levine, David Mitchell, Jeff Haight	2010
	4.8 Develop outcomes measures to determine the preparation level of clients	Kenda Jochimsen, Jim Crouch	2010
5. Business and industry increase their access to the labor pool of Iowans with disabilities	5.1 Share Employer Disability Resource Network (EDRN) with the business community	Barb McClannahan, Steve Wooderson	1/31/08
	5.2 Develop and disseminate marketing resources to business and industry. Create follow-up system to determine effectiveness of marketing and attract new customers	Jan Davis, Club 26, IBN Marketing Team, Jim Crouch	7/31/08 and ongoing
	5.3 IVRS staff consult with Business and Industry regarding their needs	Barb McClannahan and Area Office Supervisors	7/31/08
	5.4 Develop and implement database with job-ready clients	IBN Data Team	10/1/09

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## Objective 3 – Develop and deliver customer service that addresses customer needs and requirements

Lead: Mike Maher

Team: Marla Schoen, Marcy Edwards, Lucille Bundy, Kathy Brindle

Outcomes	Actions	Person(s) Responsible	Due By
1. Consistent service provision across the state	1.1 Timely Case Service and Reference Manual updates will be maintained and accessible to all RSB staff	Kenda Jochimsen and QAALB	6/30/08 and ongoing
	1.2 Manuals reflect process changes based on customer feedback and process improvements	Kenda Jochimsen, Charlie Levine, David Mitchell, Ruth Allison	6/30/08 and ongoing
2. Clear processes and expectations from internal service bureaus and providers	2.1 Internal service providers will develop and conduct surveys and focus groups to elicit feedback from internal customers about improvement opportunities	Mike Maher, Matt Coulter, Steve Wooderson, Barb McClannahan	12/31/08

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3. Customer feedback and emerging trends are incorporated into planning	3.1 Improve the process of initial contacts with DDS claimants through a Pilot Survey that provides knowledge of the disability program/process	Daette Quick	6/30/08
	3.2 Improvement opportunities will be identified and prioritized through the use of customer surveys and focus groups	Mike Maher and PDT	6/30/08
4. IRSS is launched and enhanced based on regular feedback from ASB and RSB	4.1 Complete Phase I IRSS training on Case Management and Financial Processes	Mike Maher	6/30/08
	4.2 Prioritize and implement ideas to enhance IRSS Phase I and provide training updates	Matt Coulter and IRSS Project Management Team	6/30/08 and ongoing
	4.3 Develop training plan for IRSS Phase II	Mike Maher	6/30/09

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## Objective 4 – Increase efficiency and customer value through performance accountability and continuous quality improvement

Lead: Gary McComas

Team: Tom Floren, Mary Augustus, Janice Jensen, Christine Schoening

Outcomes	Actions	Person(s) Responsible	Due By
1. Coordinated strategic goal efforts	1.1 Identify overlapping strategies and action plans	Gary McComas and Strategic Planning Team Leaders	6/30/08 and ongoing
	1.2 Communicate overlap with appropriate parties	Gary McComas and Strategic Planning Team Leaders	6/30/08 and ongoing
	1.3 With their input, develop a plan to ensure collaborative input	Gary McComas and Strategic Planning Team Leaders	6/30/08 and ongoing
	1.4 Implement plan. Monitor and make applicable changes.	Gary McComas and Strategic Planning Team Leaders	6/30/08 and ongoing
2. Use of data by all employees to improve processes	2.1 Develop a process for employees to submit ideas	Keith Hyland, Kenda Jochimsen, Tom Floren	6/30/08 and ongoing
	2.2 Incorporate process improvement into IPPEs	Keith Hyland, Kenda Jochimsen, Tom Floren	6/30/08
	2.3 Create an ongoing communication plan to promote process improvement	Unit Supervisors	6/30/08

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3. Business processes that increase quality and efficiency	3.1 Analyze business processes	Steve Wooderson, Strategic Planning Team Leaders	12/31/08
	3.2 Determine processes that need improvement and refine and adapt processes as necessary	Steve Wooderson, Strategic Planning Team Leaders	12/31/08
	3.3 Create initiative team to review improvement ideas, present to leadership, and champion for implementation	Steve Wooderson, Strategic Planning Team Leaders	12/31/08
4. Ability to identify and address issues that adversely affect ability of the agency to meet or exceed performance measures	4.1 Identify gaps and develop plans to correct, and report results via Agency Performance Plan	Keith Hyland	12/31/07
5. Use of technology to increase efficiency	5.1 Promote training and use of technology that increases productivity	Steve Nicoll, Liz McLaren	6/30/08
	5.2 ID current technology that we can immediately implement	Steve Nicoll, Liz McLaren	6/30/08
	5.3 Implement the current technology	Steve Nicoll, Liz McLaren	6/30/08



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## Objective 5 –

Build external relationships that contribute to improved services that better the lives of Iowans with disabilities

Lead: Daette Quick

Team: LeeAnn Russo, Paul Kreger, Ruth Allison, Steve Wooderson, Chris Knutson

Outcomes	Actions	Person(s) Responsible	Due By
1. Communications Specialist	1.1 Determine the general scope of the work and location of the position in the organization; interview and hire	Steve Wooderson	2/1/08
	1.2 Conduct entry into service plan	Steve Wooderson	2/1/08
2. Stronger and more positive presence within community	2.1 Determine what are the perceptions of DDS and RSB and determine ways to measure how they change over time	Ruth Allison, Keith Hyland, Chris Knutson, Paul Kreger, Lee Ann Russo, Daette Quick	12/1/08
	2.2 Develop and implement tactics for DDS and RSB to present an accurate image to the public and to increase knowledge of services provided	Ruth Allison, Keith Hyland, Chris Knutson, Paul Kreger, Lee Ann Russo, Daette Quick	12/1/08 and ongoing
	2.3 Develop and implement tactics that all employees could employ in the course of their work that could enhance image of the agency, e.g., being responsive, courteous, helpful, etc.)	Ruth Allison, Keith Hyland, Chris Knutson, Paul Kreger, Lee Ann Russo, Daette Quick	12/1/08 and ongoing

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3. Community support for DDS decisions	3.1 Identify and define ways the community supports/partners with IVRS bureaus	Ruth Allison, Keith Hyland, Chris Knutson, Paul Kreger, Lee Ann Russo, Daette Quick	12/1/08
	3.2 Develop and implement new or additional tactics that gain support for services provided by IVRS bureaus	Ruth Allison, Keith Hyland, Chris Knutson, Paul Kreger, Lee Ann Russo, Daette Quick	12/1/08 and ongoing
4. Legislators are aware of IVRS success	4.1 Establish process for gathering and maintaining success stories for VR and DDS	Steve Wooderson	5/1/08
	4.2 Develop packet template format to be used to educate legislators	New Communications Specialist	5/1/08
	4.3 Compile packet and deliver to legislature	New Communications Specialist	

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## Communicating Our Guiding Statements

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1. Employee Orientation
2. Back of business card
3. Web page
4. Brochures & marketing pieces
5. Intranet

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## Our Assumptions

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- Greater population with significant disabilities
- National push to deliver more direct services
- Global approach to service delivery
- Technology continues to advance
- Client expectation to use technology
- Language and cultural differences will impact service outcomes
- Employee and customer expectations that Agency will support differences
- 25% of workforce eligible to retire in next 5 years
- Changing employee expectations for younger/new/different/aging workforce
- Maintaining funding continues to be a challenge
- Continual push to increase client participation
- Disconnect between pre-service education programs and job expectations and philosophies

# Iowa Vocational Rehabilitation Services 2007 - 2010 Strategic Plan

## SWOT Analysis

<b>S</b> trengths	<b>W</b> eaknesses	<b>O</b> pportunities	<b>T</b> hreats
<ul style="list-style-type: none"> <li>➤ Dedicated, prepared staff</li> <li>➤ Career employees</li> <li>➤ Leadership: Visionary/encouraging</li> <li>➤ Quality commitment</li> <li>➤ Business relationships foundation - RSB</li> <li>➤ Range of services (depth, variety)</li> <li>➤ Results focus</li> <li>➤ Client centered</li> <li>➤ Adequate staff – DDS</li> <li>➤ Accountable</li> <li>➤ Expertise</li> <li>➤ Creative service delivery</li> <li>➤ DDS Technology</li> <li>➤ Internal staff trust</li> <li>➤ RSB office action plan</li> <li>➤ Individual Development Plan</li> </ul>	<ul style="list-style-type: none"> <li>➤ Content with status quo</li> <li>➤ Don't value clear, considerate communication</li> <li>➤ DDS communication</li> <li>➤ DDS cross training and communication training</li> <li>➤ No staff development plan (training, cross training, stretch projects) - DDS/ASB</li> <li>➤ Dealing with change</li> <li>➤ Change transitioning and method</li> <li>➤ Concern for job stability</li> <li>➤ Role clarification and customer service between ASB and RSB</li> <li>➤ Inconsistency in service delivery</li> <li>➤ Teamwork</li> <li>➤ Perceived image</li> <li>➤ External communication</li> <li>➤ Capacity to serve all</li> <li>➤ Different use of rules</li> <li>➤ Slow ability due to State HRE practices</li> <li>➤ Dealing with security issues</li> </ul>	<ul style="list-style-type: none"> <li>➤ Assistive Technology benefits and career planning</li> <li>➤ Workforce planning/performance management/hiring competencies</li> <li>➤ Developing best practices</li> <li>➤ Technology for DDS case processing and work distribution and work methods</li> <li>➤ Global workforce trends</li> <li>➤ Business partnerships</li> <li>➤ Advocacy group partnerships</li> <li>➤ National training</li> <li>➤ Networking/PR</li> <li>➤ EWD (entrepreneurial) program</li> <li>➤ Relationship with RSA</li> <li>➤ DDS relationship with SSA</li> <li>➤ Constituency relationships and marketing of</li> <li>➤ Alignment with other State entities</li> <li>➤ Process improvement</li> </ul>	<ul style="list-style-type: none"> <li>➤ Funding</li> <li>➤ Dismantling of State/Federal programs</li> <li>➤ Cut corners/quality/integrity to meet production requirements</li> <li>➤ Misperception of services</li> <li>➤ Informal communication</li> <li>➤ Inhibiting State policies – Innovative, implement change</li> <li>➤ Losing seasoned people: knowledge loss</li> <li>➤ Increased workloads due to Baby Boomers</li> <li>➤ Local competition</li> <li>➤ Inconsistent service delivery</li> <li>➤ Management content with status quo</li> </ul>

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## Critical Success Factors

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- Trained, accountable, knowledgeable staff
- Concrete, effective and timely communication
- Continue to develop and expand business and stakeholder relationships
- Empowered staff that delivers innovative, collaborative, consistent customer services
- Anticipate and develop workforce to meet future business needs
- Effective use of data systems to provide information
- Meet and exceed federal expectations
- Efforts aligned to achieve priorities
- Organization that embraces continual improvement

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**NOTES:**